

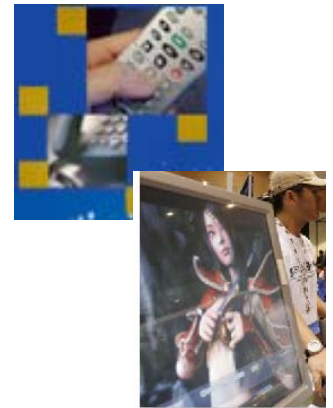


The Philippine Cable Industry

Philippines

Market Overview

- ▶ Over 700 small and medium-sized cable providers service 2 million cable subscribers throughout the Philippines.
- ▶ Still, 500 municipalities (out of 1500 nationwide) are not covered by cable systems.
- ▶ Though subscriber penetration continues to grow, Metro Manila alone has an untapped market of 3 million households.



Cable Operators

- ▶ Beyond Cable and Global Destiny dominate the Metro Manila provider market with 70% and 30% market share, respectively.
- ▶ Both major operators are upgrading from analog to digital technology and are actively seeking suppliers.
- ▶ The Philippine Cable Television Association is lobbying Congress in favor of a new Bill to open the cable industry to foreign investors and impose stiffer penalties against pirates.



Commercial Opportunities

- ▶ Expansion projects in and around Metro Manila and network growth will continue to drive demand for new cabling and equipment for the next three years.
- ▶ The larger operators intend to purchase modulators, line extenders, amplifiers, digital boxes, scrambling technology and other anti-piracy and pro-growth technologies.
- ▶ High demand exists for US content providers such as HBO, Disney, Discovery and others. U.S. programs are consistently among the top ranked, most-viewed shows.
- ▶ Service providers are looking at VoIP technology and cable telephony for future growth.



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